

Data +Mail Merge = **MAGIC!** Cheat sheet

Note: To download files and access resources used for this session go to: <http://pennyspresentations.wikispaces.org>

Word 2007/2010

1. Prepare your data document. (Export data out of TopsPRO as an Excel file. Create a data table in Word.)
2. Prepare your main document (certificate, name tags, address labels etc) in Microsoft Word. Enter all static information (the stuff that will not change). Be sure to check margins, orientation etc.
3. Link your data document to your main document. In Word click: **Mailings tab>Select Recipients> Use Existing List> Find data document> Select document> Select OPEN.**
4. If prompted, choose the worksheet where the data is located.
5. In the main document insert the merge fields where you want them. **Mailings tab> Insert Merge Field> Select the field you want.** (If you click the top of the button you will get a dialog box, where if you click on the words 'Insert Merge Field' you can choose from a drop-down list.)
6. Preview your document **Mailings tab> Preview Results**
7. Use the navigation buttons to review how your final document will look with each person's data.
8. Merge the document.
 - a. If you wish to add personal comments or other text to individual certificates, choose **Mailings tab> Finish & Merge> Edit Individual Documents.**
 - b. If you are confident everything is perfect you can send the merge directly to your printer. Choose **Mailings tab> Finish & Merge> Print Documents.** Choose your merging options (all records, current record or a range of records) Click OK. Verify the printer in the print dialog box and click OK.
 - c. The last option allows you to do a mail merge to an email. This requires an email address field in your data document.
9. If you choose **Edit Individual Documents** Word will create a NEW document named *Letters*. Each page of the document represents one record in your data document. You can add special text to individual certificates, save the file and then print them.
10. Your main document is ready to use over and over again. Repeat step 3: Linking your data source to your main document when you change your data source. [For example, for a new course.] Word must know where to get the information *from*. Do not forget to SAVE!

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Word 2003

Word 2003 uses a “wizard” format to help you complete your merge. To activate the wizard, click on Tools>Letters & Mailings > Mail Merge... to start the merging process using the Mail merge task pane. There are 6 steps to walk you through the process. Make your choices and then click “next step” at the bottom of the task pane. [Also, if you prefer using a toolbar, you can turn on the Mail Merge tool bar by selecting View> Toolbars> Mail Merge. This toolbar displays helpful buttons to speed up the mail merge process. Be sure to explore it!]

1. Prepare your data document. Export data out of TopsPRO as an Excel file.
2. Prepare your main document (certificate, name tags, address labels etc) in Microsoft Word. Enter all static information (the stuff that will not change). Be sure to check margins, orientation etc.
3. Choose “Document Type” from the Task Pane. Click “Next: Starting Document” at the bottom of the Task Pane.
4. Click one option under “Select starting document” You can choose to use the current document you have open, or chose from either a template or an existing document you created earlier. Click “Next: Select Recipients” at the bottom of the Task Pane.
5. In this step you need to select your data source (recipients). If you use an existing list, such as the TopsPRO report, click “Browse” and find the file. This data file is now “linked” to your main document.
6. On the task pane click “Next: Write your letter”
7. When prompted, select the worksheet that contains your data.
8. In the Mail Merge Recipients dialog box you can sort or filter which records you wish to merge.[And if you change your mind you can always return to this step and choose “Edit recipient list...”
9. Once you complete this step, click on “Next: Write your letter” [this will change depending on what type of starting document you chose.]
10. As you edit your text, use the links in the Mail Merge task pane to insert the merge fields into your document. Word will insert all the fields necessary for an “Address Block” by simply clicking on the link. A dialog box will allow you to specify different elements of the address information.
11. To insert fields specifically from your data, click on “More items...” From the “Insert Merge Field” dialog box, select the field you want and click “Insert.” Click “close” after the field is inserted into your document.
12. To preview your letters with the inserted mail merge fields you inserted, use the “<<” and “>>” buttons on the task pane. You can edit your recipient list as well as exclude certain records from this preview pane. Once you are confident your document is correct, click on “Next: Complete the merge” at the bottom of the Mail Merge task pane.

13. On this final step, depending on what type of starting document you selected, you will have different choices for completing the merge. Read the information provided at the top of the Mail Merge task pane and make your choice.
14. Remember: Always SAVE your document!

Special note: Sometimes when you retrieve data from TopsPRO, the “name” field displays the names as “lastname, firstname” which does not look very nice on documents. Therefore, before you use that data document for mail merge you need to convert the data from one column (“Name”) to **two** columns (“Firstname” and “Lastname”). One column will be for your first name field, the second for the last name field. Here is how to change one column of data into two:

First, insert a blank column next to “Name” by RIGHT-clicking on the column letter and choosing Insert> Column.

Second, select the range of names.

Third, from the menu bar choose Data> Text to Columns. A wizard opens and walks you through “splitting” the names at the comma. Follow the directions in the wizard and use the Preview option to verify your data is splitting correctly.

Lastly, be sure you give your new columns names like “FirstName” and “LastName” in the first row. These names will then show up on your “Insert Merge Field” dialog box so you can insert them into your Main Document where appropriate.

This process can be used to “split” data out of a single column into multiple columns, making mail merge even more powerful!